Case Maintenance
How Do I Guide

Case/Participant Information

Case Information

How Do I…?	Selections	Tips & Guidelines
View/update case information	▪ On the Cases expando, click on the case name. ▪ On the Maintain Case page/Participants tab, enter the applicable data/values. ▪ If appropriate, click the Options list and select the applicable option. Click the Go button. ▪ On the selected option page, enter the applicable data/values.	*The Deactivate/Reactivate and Remove links display for each participant.* *Remove to delete from the case, ReActivate or DeActivate to change status. Note: Only a supervisor can remove a participant.*
View/update case participant information	▪ On the Maintain Case page/Participants tab, click on the participant name in the Participants group box. ▪ On the Person Management page, enter the applicable data/values.	*When the First Name or Last Name fields are updated, the system will automatically create a row on the AKA tab.*
Add a participant to case	▪ On the Maintain Case page/Participants tab, click the Insert button. ▪ On the Search Person page, enter the applicable data/values and click the Search button. ▪ For a match: Click the Select link for the applicable person(s) and click the Continue button. ▪ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Create button to access the Person Management page. Enter all applicable data/values. Click the Save button and then the Close button on the Person Management page. On the Search Person page, click the Continue button.	*Upon completion of creating a new person, If potential person matches exist, The Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Intake Inquiry Search page.*
Update case address information	▪ On the Maintain Case page/Address tab, enter the applicable data/values and click the Update button. ▪ On the Update Address pop-up page, select the applicable participants. ▪ Click the Save button and then the Close button.	*Note: The effective date of the address change and the new address information must be entered prior to clicking the Update button.*
View/update participant address information	▪ On the Maintain Case page/Participants tab, click on the participant name in the Participants group box. ▪ On the Person Management page/Address tab, click the Edit link to update address. ▪ Enter the applicable data/values on Address Management page.	
Add collateral	▪ On the Maintain Case page/Collaterals tab, click the Insert button in the Collaterals group box. ▪ On the Search Person page, enter the applicable data/values and click the Search button. ▪ For a match: Click the Select link for the applicable person(s) and click the Continue button. ▪ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Create button to access the Person Management page. Enter all applicable data/values. Click the Save button and then the Close button on the Person Management page. On the Search Person page, click the Continue button.	*After completing the Person Management page to create the record for a new collateral for whom there was no match, you will be returned to the Search Person page to complete the search in order to add the collateral to the case.* *To delete a collateral, click the Delete link for the applicable collateral.*
Add contact	▪ From the Maintain Page/Collaterals tab, click the Insert button in the Other Contacts group box. ▪ Enter the applicable data/values.	*To delete a contact, click Delete link for the applicable contact.*

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Case/Participant Information

Education Information

How Do I…?	Selections	Tips & Guidelines
Establish education record	▪ Click Create > Case Work > Education > Education Record. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Education page, enter the applicable data/values.	
Document new school district jurisdiction	▪ On the Responsible School Dist. Tab, click the Insert button. ▪ Enter the Applicable data/values.	
Send notification	▪ On the Responsible School Dist. Tab, click the Notify link. ▪ On the Education Notification pop-up page, enter the applicable data/values. ▪ Click the Text link to access the selected template, enter the applicable data/values. ▪ Click Close and Return to eWiSACWIS.	
Add new school information	▪ On the Education History tab, click Insert. ▪ On the Maintain Education History page, enter the applicable data/values.	
Update school history	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Education icon and click the appropriate education item. ▪ On the Education History tab, select the Edit link for the applicable school history line.	

Medical/Mental Health Information

How Do I…?	Selections	Tips & Guidelines
Establish medical/ mental health profile	▪ Click Create > Case Work > Medical/Mental Health > Medical Profile. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Medical/Mental Health page, enter the applicable data/values.	

Document medical services received	▪ On the Medical History tab, click the Insert button.
	▪ In the Treatment History box, click the provider Search link to search for a provider.
	▪ On the Provider Search page, enter the applicable data/values and click the Search button.
	  ▪ For a match: Click the Select link for the applicable person(s) and click the Continue button.
	  ▪ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Close button on the Provider Search page and complete the Other Provider field in the Treatment History box.	

Update medical history	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Medical/Mental Health icon and click the appropriate medical profile item. ▪ On the Medical History tab, enter the applicable data/values in the Treatment History box.	

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Special Needs/Unmet Needs

How Do I…?	Selections	Tips & Guidelines
Establish unmet needs record	▪ Click Create > Case Work > Administration > Unmet Needs. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Register Unmet Needs page, enter the applicable data/values.	
View/update unmet needs record	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Administration icon and click the applicable Unmet Needs item. ▪ On the Register Unmet Needs page, enter the applicable data/values.	
Update out of home placement services information	▪ On the Register Unmet Needs page, click the Out of Home Placement Service radio button. ▪ Select Placement from the Options list and click Go. ▪ On the Out of Home Placement page, enter the applicable data/values.	
Certify special needs	▪ Click Create > Case Work > Administration > Certification of Special Needs. ▪ Click the appropriate case and case participant. ▪ On the Certification of Special Needs page, enter the applicable data/values. ▪ Select Approval from the Options list and click Go. ▪ Click Approve and Continue.	

IV-E Eligibility

How Do I…?	Selections	Tips & Guidelines
Refer case to eligibility specialist	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Eligibility icon and click the appropriate Title IV-E Eligibility Determination. ▪ On the Eligibility page/Basic tab, enter the applicable data/values. ▪ Select SEU Regional Manager from the Options list and click Go.	*The system generates the Title IV-E Eligibility Determination record from an approved Out of Home Placement.* *Before referring the case to the eligibility specialist it is very important to verify that the eWiSACWIS record reflects the SSN accurately. Consult with the eligibility specialist if you are unsure of the accuracy of the current record.*

Trust Accounts

How Do I…?	Selections	Tips & Guidelines
View trust account information	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Eligibility icon and click the appropriate Trust Account. ▪ On the Trust Account page, click and view the applicable tabs.	

Assets & Employment

How Do I…?	Selections	Tips & Guidelines
View/update participant financial information	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Income/Eligibility icon and click the applicable asset/employment item. ▪ On the Asset/Employment page, enter applicable data/values.	

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Closing Cases

Closing Cases

How Do I…?	Selections	Tips & Guidelines
Initiate case closure (Day 1)	▪ On the Cases outliner, click on the case name. ▪ On the Maintain Case page/Closing History tab, select Submit Case Closure Request from the Options list. ▪ On the Case Closure page, enter the applicable data/values. ▪ If appropriate, select Safety from the Options list and click Go. ▪ On the Final Safety Assessment Selection page, click the applicable check box. Click Save and click Close.	*The Final Family Assessment template may be accessed via the Case Closure page by selecting Final FA from the Options list.* *The Case Closure Summary template may be accessed via the Case Closure page by selecting Closure Summary from the Options list.* *Complete the Case Record Location group box on the Closing History tab of the Maintain Case page.* *If a screened in intake is linked to the case at this stage, the case closure will be automatically 'Not Approved' with the reason: closure disrupted.*
Complete case closure (Day 2)	▪ On the Cases outliner, click on the case name. ▪ On the Maintain Case page/Closing History tab, select the Maintain link for the appropriate case closure request. ▪ On the Case Closure page, enter the applicable data/values. ▪ If case closure request is accepted, select Approval from the Options list and click Go. ▪ Select Approve on Approval history page. Click Continue. ▪ On the Closing History tab, click Close. ▪ If case closure request is denied, expand the Closure Denial Messages section on the Case Closure page or refer to the Case Closure Edit Report for information regarding those issues which need to be resolved before the case closure request can be accepted. *Note: For case closure requests that have been denied, you may have incomplete work or you may be missing work which would require you to create new work to address the case closure denial reason.* ***If the case closure request was denied due to incomplete work*** *- once you finish any incomplete work, eWiSACWIS automatically processes the pending case closure again. There is no need to re-submit the case closure request.* ***If the case closure was denied due to missing work****, which requires new work to be created, select Not Approve for the closure request. Selecting Not Approve will end the request process allowing you to create new work for the case. You will need to re-submit the case closure request.*	*All plans must have been terminated for a case closure request to be accepted by eWiSACWIS.* *The closure status may be denied if any of the following items is not completed: PS Reports without completed Initial Assessments, Open Placement, Medicaid Certifications Not Complete, Pending or Ongoing Plans, Participants in Protective Custody, Approval Processing Not Complete.* *If a case does not close, please refer to the Case Closure Edit Report for reasons why the case closure was denied.* *The Closure Denial Messages section of the Case Closure page will also show the specific reasons the case's closure request was denied.* *The Closure Denial Solutions document accessed from the Options list provides solution information for resolving case closure denial issues.*

Merging Persons

Merging Persons

How Do I…?	Selections	Tips & Guidelines
Merge person with person(s) identified by the potential duplicate person batch	▪ Click Utilities > Person Merge. ▪ On the Person Merge page, click the Search link in the Keep Person group box. ▪ On the Search Person page, enter the applicable data/values. ▪ Click the Search button and select the participant to be kept. Click Continue. ▪ On the Person Merge page, the system will display all potential duplicate persons based on defined matching criteria in the Potential Removal Person(s) group box. ▪ Click the check box in front of each potential duplicate person or multiple persons to be merged into the keep person. ▪ Click Save.	*The remove person on the merge record may not be a worker, have an open placement, have a previous 'Out of Home placement', overlapping placement dates (for in home services placement type), have a pending referral or assessment, or have an open eligibility record.* *Selecting the Keep hyperlink displayed in the Potential Removal Person(s) group box for a person will update the page by to reflect that person as the Keep person.* *Selecting the Name hyperlink of the person displayed in the Potential Removal Person(s) group box will display the person management record for that person as view-only.*
Merge person with person not identified by the potential duplicate person batch	▪ Click Utilities > Person Merge. ▪ On the Person Merge page, click the Search link in the Keep Person group box. ▪ On the Search Person page, enter the applicable data/values. ▪ Click the Search button and select the participant to be kept. Click Continue. ▪ On the Person Merge page, the system will display all potential duplicate persons based on defined matching criteria in the Potential Removal Person(s) group box. Click the Manual Search link to search for a person not displayed in the Potential Removal Person(s) group box. ▪ On the Search Person page, enter the applicable data/values. ▪ Click the Search button and select the participant to be kept. Click Continue. ▪ The person you selected will display in the Potential Removal Person(s) group box as selected for merge. ▪ Click Save.	*The remove person on the merge record may not be a worker, have an open placement, have a previous 'Out of Home placement', overlapping placement dates (for in home services placement type), have a pending referral or assessment, or have an open eligibility record.* *Selecting the Keep hyperlink displayed in the Potential Removal Person(s) group box for a person will update the page by to reflect that person as the Keep person.* *Selecting the Name hyperlink of the person displayed in the Potential Removal Person(s) group box will display the person management record for that person as view-only.*
View Person Merge denial reason or Delete merge person request	▪ Click Utilities > Person Merge Delete. ▪ On the Person Merge Delete page, click the Delete checkbox for the merge person request you wish to remove. Click Save. ▪ A system message displays asking you to confirm you want to delete the person merge request. Click the appropriate button. ▪ Click Close.	

Merging Cases

Merging Cases

Initiate case merge (Day 1)	▪ On the Cases outliner, click on the case name. ▪ On the Maintain Case page/Closing History tab, select Submit Case Closure Request from the Options list. ▪ On the Case Closure page, select Merge in the Reason list and click the Merge link. ▪ On the Case Search page, enter the applicable data/values and click the Search button. ▪ Click the radio button for the appropriate case. Click Continue. ▪ On the Case Closure page, click Save and then click Close. *Note: When merging two cases, select the case that you want to remove for reason of merge for this process.*	*Merge must be selected in the Reason field.* *"TPR Merge to CPS Family Case" must be selected in the Reason field in order to merge a Pre-Adoptive case back to the CPS Family case.* *Check the status of the cases to be merged. You cannot merge an open case into a closed case.* *To merge two cases, the reference person (person id number) needs to be the same individual in both cases.* *To merge a Pre-Adoptive case to the CPS Family case the "Retain Case" ID must be the original case from which the child was TPR-ed.* *The selected case will become the record for the merged cases—i.e., it will overwrite information in the current case.*
Complete case merge (Day 2)	▪ On the Cases outliner, click on the case name. ▪ On the Maintain Case page/Closing History tab, select the Maintain link for the appropriate case merge request. ▪ On the Case Closure page, enter the applicable data/values. ▪ If case closure request is accepted, select Approval from the Options list and click Go. ▪ Select Approve on Approval history page. Click Continue. ▪ On the Closing History tab, click Close. ▪ If case closure request is denied, refer to the Case Closure Edit Report, or the Closure Denial Messages section of the Case Closure page, for information regarding those issues which need to be resolved before the case closure request can be accepted.	

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WiSACWIS Knowledge Web
http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm

AFCARS

AFCARS

How Do I…?	Selections	Tips & Guidelines
Check for a child's AFCARS errors when the AFCARS tickler is displayed under the Tickler expando	▪ On the Ticklers outliner, click the appropriate case to expand it. ▪ Click on the hyperlink to be directly taken to the AFCARS Foster Exception page	
Check for a child's AFCARS errors when no AFCARS tickler is displayed	▪ Search out the child's person ID. ▪ Click Utilities > AFCARS. ▪ On the blank AFCARS Foster Exceptions page, click the Search link. ▪ On the Search Person page, enter the child's name or person ID in the appropriate search criteria field and click Search. ▪ Click the appropriate person icon. ▪ Click the person's Cases icon. ▪ Select the appropriate Case Folder icon. Click Continue.	*The child's person ID number is helpful for searching out the child on the AFCARS page.*
Correct AFCARS fields contained in the AFCARS Exceptions page	▪ On the AFCARS Exceptions page, enter appropriate data in blank fields with white background. ▪ Click Save.	*Once all AFCARS errors have been corrected and the nightly batch process runs the AFCARS ticklers will be deleted from the Ticklers outliner.* *For more detailed information, please access the AFCARS resources on the Knowledge Web.*
Correct AFCARS fields not contained in the AFCARS Exceptions page	▪ On the AFCARS Exceptions page, blank, non-editable fields with gray background have a brief error message in the Exception Messages box. ▪ Click Print Exception Messages. ▪ Correct data on applicable pages.	*Once all AFCARS errors have been corrected and the nightly batch process runs, the AFCARS ticklers will be deleted from the Ticklers tab.* *For more detailed information, please access the AFCARS resources on the Knowledge Web.*